TolaData

TolaData

USER GUIDE 1

Account Set-up

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1. TolaData User Guide: Account Set-up

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1. Setting up your user account

1.1. The Org Admin for your organisation will send you an email invitation to join TolaData. More information for Org Admins on inviting new users to TolaData can be found in our knowledgebase:
https://www.toladata.com/docs/quick-start-guide/invite-new-users-to-toladata/

1.2. Click on the link in the email, set your password and you're ready to go. *Nb: TolaData is configured for the latest version of the Google Chrome and Microsoft Edge browser. Please ensure you are using one of these browsers when setting up your account.*

1.3. You can then log in to TolaData at toladata.io using your email and password.

1.4. If you forget your password there is a link on the login page to reset it.

The Project

To access the features of TolaData, you must have access to a project. You can either create your project or join a team member's existing project.

2. Create a new project or ask to join an existing project

2.1. Create your first project on TolaData by selecting the 'Project' section on the navigation panel on the left hand side, then click 'Add new project.'[1]

2.2. Type in the name of your project, its start and end date and click 'Save'.

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[1] Depending on your organisation's TolaData setup, this may be labelled differently, e.g. "project" and "Add new project".

2.3. If you want to join a project that someone else has created you can ask them or the Org Admin to add you to that project team. They can add you to the project and set your permissions in the teams tab of the project details page.

3. Give other users access to your project

3.1. To give other users access to a project you have created you add them as team members to that project. [Please note that users first must have been invited by the Org Admin to create their TolaData account]

3.2. Begin by selecting 'Project' in the left hand navigation panel. Next, click on the name of the project you have created. This will bring you to a page where you can see details of the project.

3.3. Click on the 'Team' tab, followed by 'Add existing team member.' Start adding users from the drop down menu.

3.4. The members you add to a specific project will have access to all the data of that project but you can set their permissions by changing their role. There are four types of project roles:

- **Project Admin:** manages the team and permissions for the project, set up of project structure, full edit rights to the project data which includes additional rights for editing and deleting certain data. It is possible to have more than one Project Admin.

- **Edit User:** has full edit rights to the project data with some restrictions on what they can edit or delete.

- **Data Entry:** has view only access to all project data but can't edit or add data, except can input new results, import data tables, request approvals and add document links.

- **View Only:** has view only access to all project data but can't edit or add data.

3.5. More information on adding project team members is available in our knowledge base: https://www.toladata.com/docs/quick-start-guide/add-team-members-to-your-pr

Exercise A.

☐ Create your own project
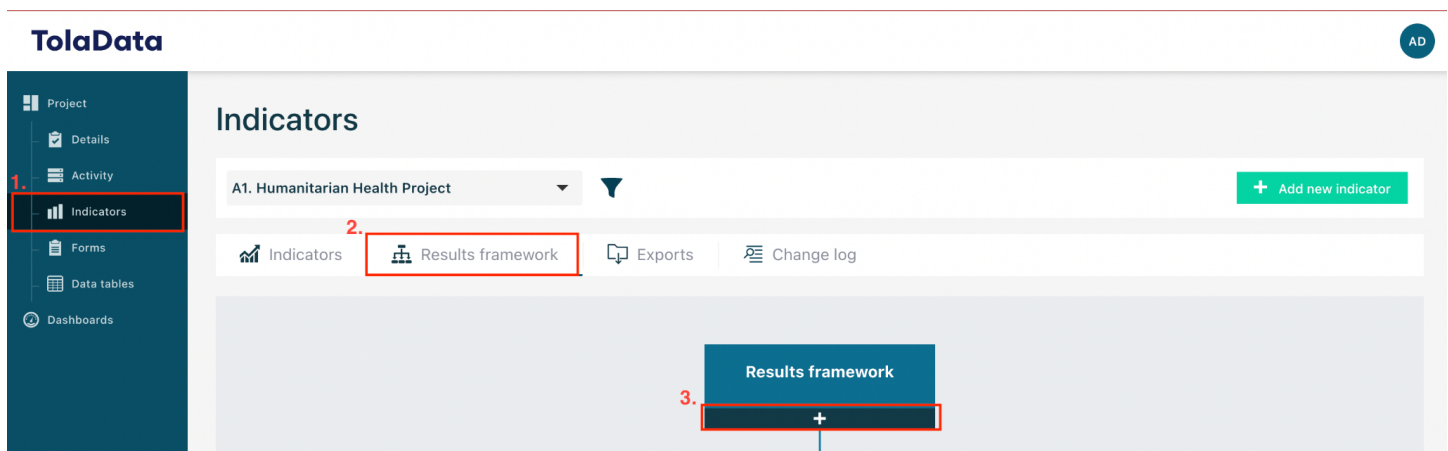☐ Add a team member to your project and set their permissions.

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The Indicator Section

The Indicator section in TolaData helps you to assess whether your interventions and approaches are on the right track to achieve your intended outcomes and outputs. In your indicator workflow, you can track your progress against the overall and periodic targets, with easy tools to report both your total and disaggregated results.
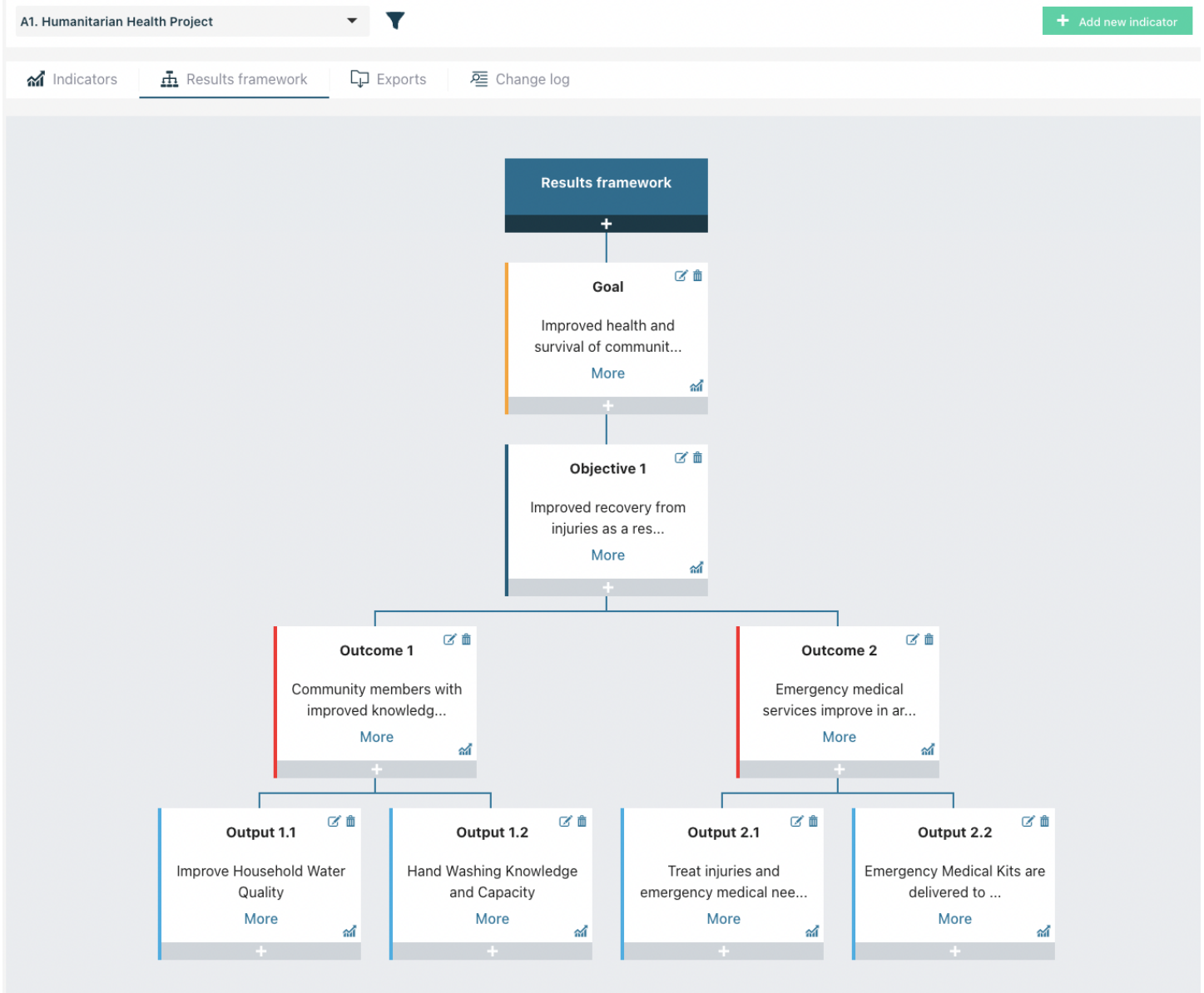
4.   Build a results framework

Use the results framework feature to visualise the logic model of your project and organise your indicators.

4.1.   Select 'Indicators' on the navigation panel and use the drop down menu at the top left of the page to select the project you want to add indicators to, then click on the 'Results framework' tab.

4.2.   Click on the '+' to start building your framework levels with your project objectives, outcomes, outputs etc.

4.3.   You can add as many results framework levels as you like to build out your results framework tree as seen below.

5. Add an indicator plan

5.1. Select 'Indicators' on the navigation panel and use the drop down menu at the top left of the page to select the project you want to add indicators to.

5.2. Click 'Add new indicator.'

5.3. Fill in the indicator name and select the indicator format. Indicators can be numeric, percentage or qualitative.

5.4. Finish adding your indicator details and select save.

5.5. You can drag and drop your indicators within the list to organise them under the results framework headings.

5.6. Click on the name of an indicator to open it and add more details

Exercise B.

☐ In the project you have created, add three results framework levels - a goal, an outcome and an output level. Try to add a description to each level and a corresponding colour.

☐ Navigate back to the indicator tab and create three indicators - one numeric indicator, one percentage indicator and one qualitative indicator.

☐ Try organising the indicators in the indicator tab by dragging and dropping them under your result framework levels.

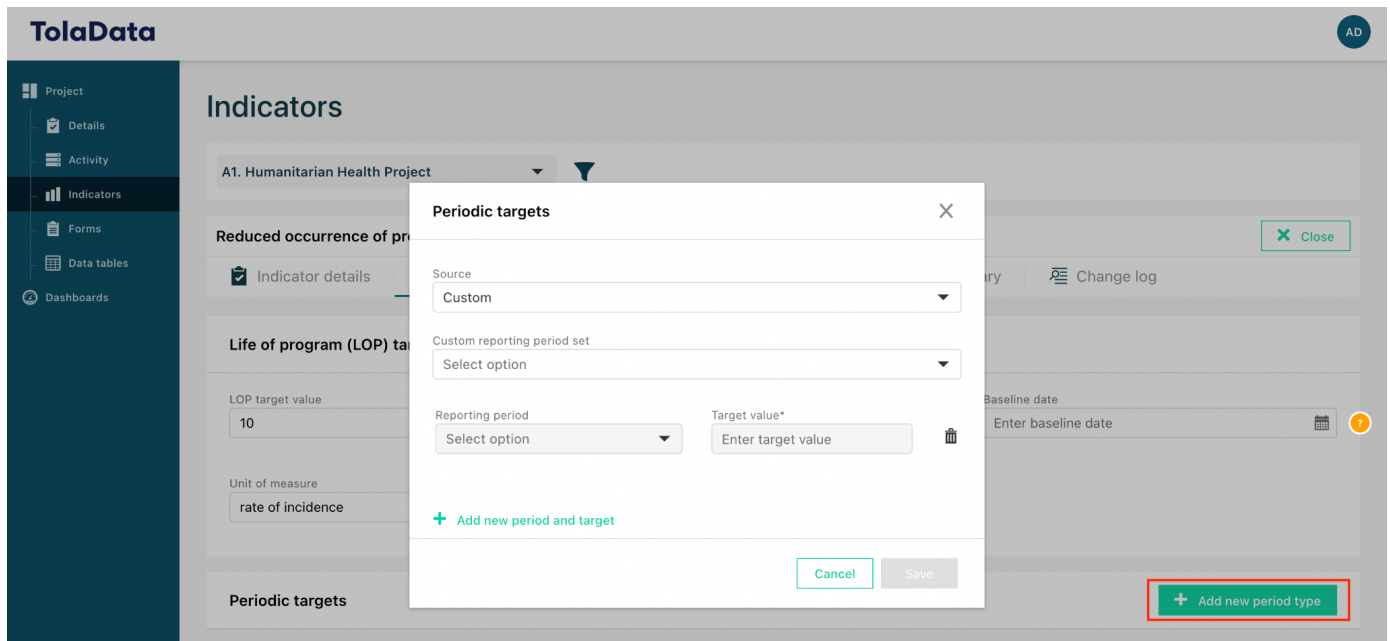## Adding Periodic Targets & Disaggerations to your Indicator

Link reporting periods and disaggregations to your indicator to further analyse your data.

5.7. **Add periodic targets**: click on the 'Targets and disaggregations' tab and then click 'Add new periodic type'.

5.8. There are two sources of periods you can choose from:

5.8.1. Standard: monthly, quarterly, semi-annual or annual periodic targets according to the standard calendar (eg. Quarter 1 = 1 January - 31 March)

5.8.2.   Custom: these are customised periods created by the admins for the project. For example, they might be the donor's annual reporting period (eg. USAID annual = 1 October - 30 September)

5.8.3.   More   information   on   managing   reporting   periods   is   available   here: https://www.toladata.com/docs/knowledge-base/indicator-workflow/add-reporting-periods/

5.9.   Link disaggregation types: click on the 'Targets and disaggregations' tab. At the bottom of the form you will see the disaggregation types already linked and available to the indicator. To link another disaggregation type, click "Add disaggregation types" and select the disaggregation type you want to make available to the indicator.

5.9.1.   Custom disaggregation types are created at the details level of the project.

5.9.2.   Disaggregations can have default ranges attached to them.

5.9.3.   More   information   on   creating   and   managing   disaggregations   is   available   here: https://www.toladata.com/docs/knowledge-base/how-to-manage-disaggregations/

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Exercise C.

☐ Select the numeric indicator you have created, navigate to the targets and disaggregations tab.

    ☐ Add a reporting period by selecting 'Add new period type'. As the source, select 'Standard' and in the 'Type of periodic target' dropdown select 'Annual'.

    ☐ Add a reporting period target for two years

    ☐ Select 'Save'

    ☐ Next, add a disaggregation type. Select 'Link disaggregation types' and select the standard disaggregation type 'Country'.

Adding Data to your Indicator

Data can easily be added to your indicator depending on your data collection method! Data can be added manually, from a TolaData form or from any machine readable source.

6. Manual Entry

6.1. Go to the 'Indicator' section. Here, you will see your list of indicators and every indicator will have a 'Collected data' icon on the right hand side (next to the delete icon.)

6.2. Click on the 'Collected data' icon to open the data results list for that indicator.

6.3. Click 'Add new collected data'.

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6.4. Two options for entering data will appear, manual entry or pull from data table. Select manual entry.

6.5. Enter the collected value and the date collected. You can also add an identifier and link the collected data to a site. For more information on manual entry select here: https://www.toladata.com/docs/knowledge-base/indicator-workflow/add-collected-data-to-your-indicators/

6.6. Once you have added all relevant information select save.

Exercise D.

☐ In your numeric indicator, add a piece of data manually

7. Pull from Data Table

To add data from a machine readable source, we must first import the dataset into TolaData. You can import data into the system from other sources such as KoBo Toolbox, ONA, Google Sheets, Excel, One Drive or CSV files.

7.1. Click on 'Data tables' in the navigation panel.

7.2. Select the project from the drop down menu that you want to add data to, then click on 'Import table' and select the source of your collected data.
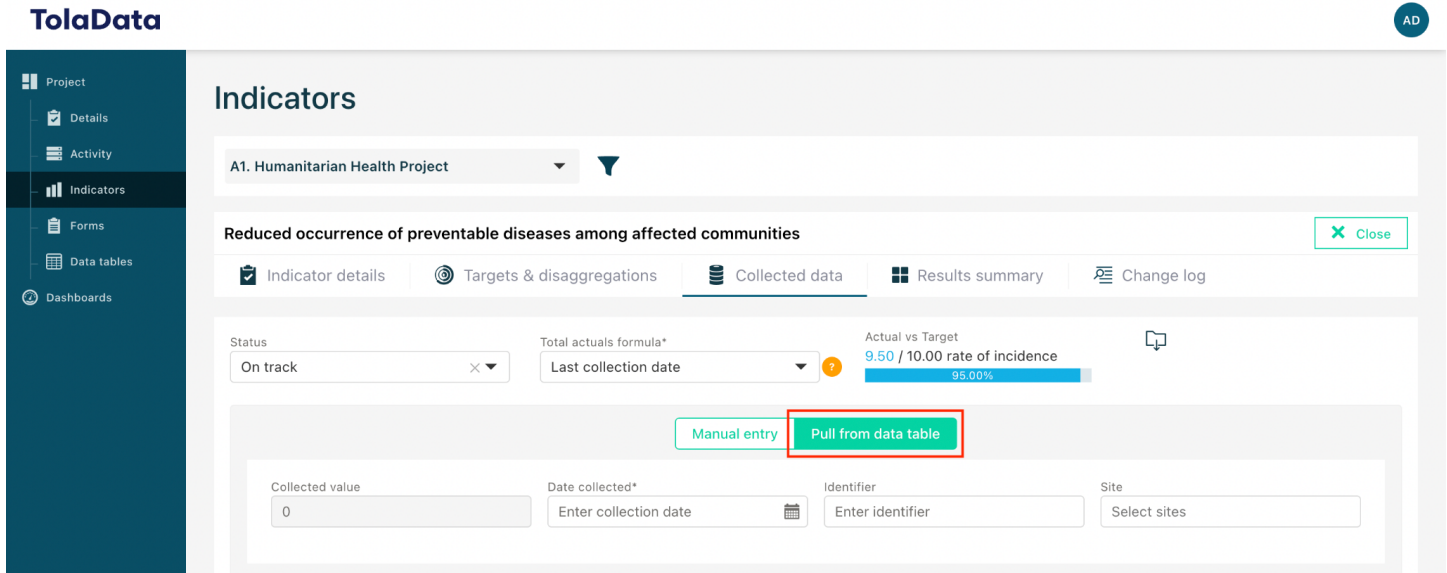

7.3. More information on importing data can be found in our knowledge base: https://www.toladata.com/docs/knowledge-base/data-collection-and-management/import-data-external-sources/

Add collected data result to an indicator

7.4. Go to the indicator you would like to add data too.

7.5. Click 'Add new collected data' and select the 'pull from data table option'. This option allows you to pull data directly from a data set you have imported into the data tables section to calculate the results automatically. You can apply different mathematical operations and also conditions to filter your results.

7.6. More Information on adding collected data can be found in our knowledge base: https://www.toladata.com/docs/knowledge-base/indicator-workflow/add-collected-data-to-your-indicators/

Exercise E.

☐ In your numeric indicator, add a piece of data from a Data Table
☐ Begin by importing a dataset into TolaData in the DataTables section
☐ Once imported, link the data to your numeric indicator

See a summary of the results for your indicator

7.7. See a summary of the results for your indicator: Click on the 'Results summary' tab to see your indicator results analysed over time, against your periodic targets and by the disaggregation types used in your collected data.
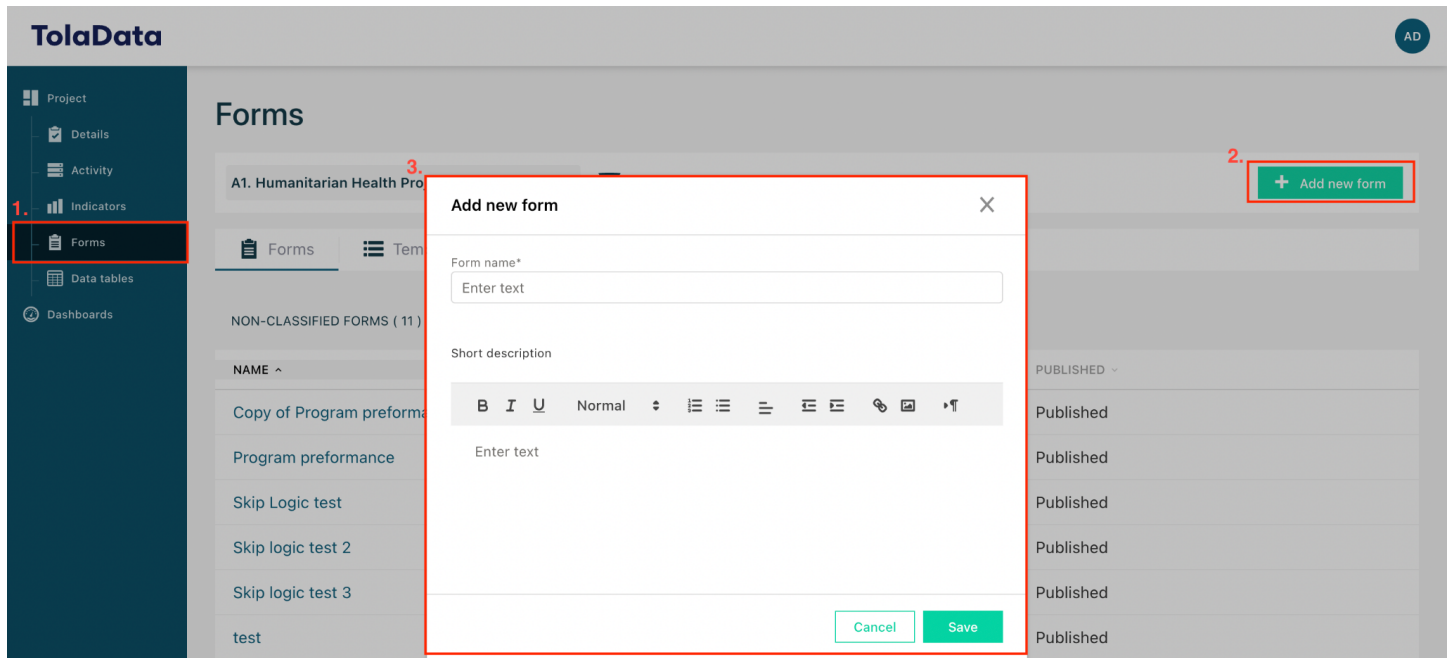
8. Create a data collection form

You can create your own forms to share with other staff, partners and data gatherers.

8.1.   Click on 'Forms' on the navigation panel, select the project you want to create a form for from the drop down menu on the top left hand side, and then click 'Add new form'.

8.2.   Enter the name of your form and then click 'save'.

8.3. Click the form name to open it. It is currently a draft so you can edit it and add questions. You can save the form, come back and edit it as many times as you like until you publish it.

8.4. Once a form is ready to start being used you can publish it and share it with data gatherers. Data gatherers do not have to be users of TolaData, they just need the unique web form link to submit data.

8.5. Once a form is published you cannot make any further changes to it. However you can stop further submissions if you wish to end the data collection.

8.6. When you publish a form a new data table is automatically created. Click on 'Data tables' on the navigation panel and select the project you want to view the data tables for. Click on the data table name to open it. Every time a data gatherer submits data using a webform another row of data is added to the data table.
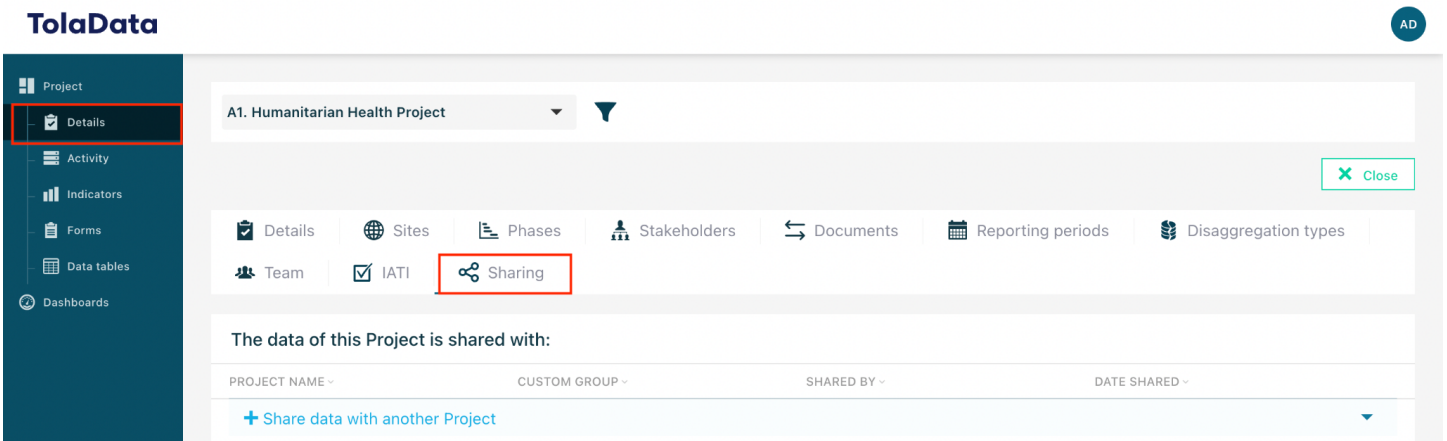

8.7. More information on collecting data using Forms is available in our knowledge base: https://www.toladata.com/docs/knowledge-base/data-collection-and-management/toladata-form-builder/

9. Create aggregated indicators

To create aggregated indicators, contributing indicators are linked to the aggregated indicator and the result calculated based on a predefined formula.
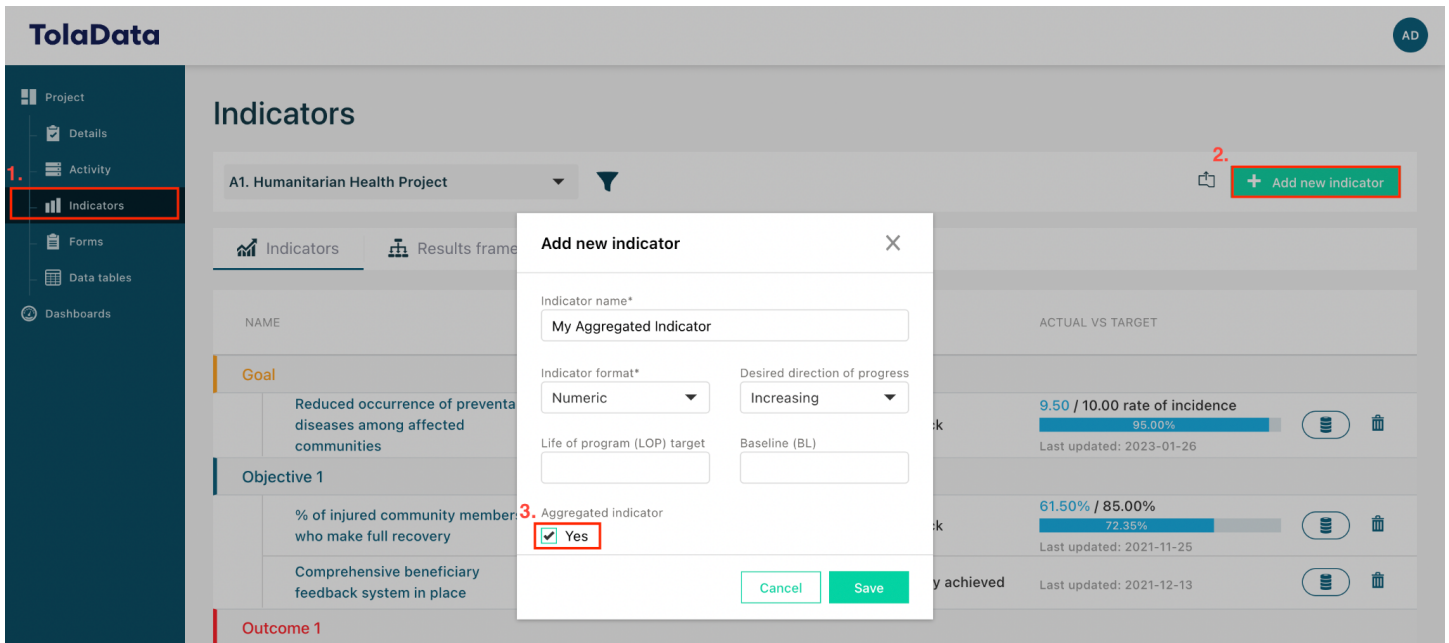
9.1. You can aggregate within and across projects. In order to aggregate across projects, you will first need to ensure that you are receiving data from the project from which you want to select contributing indicators. This happens in the 'Sharing' tab in the project details page.
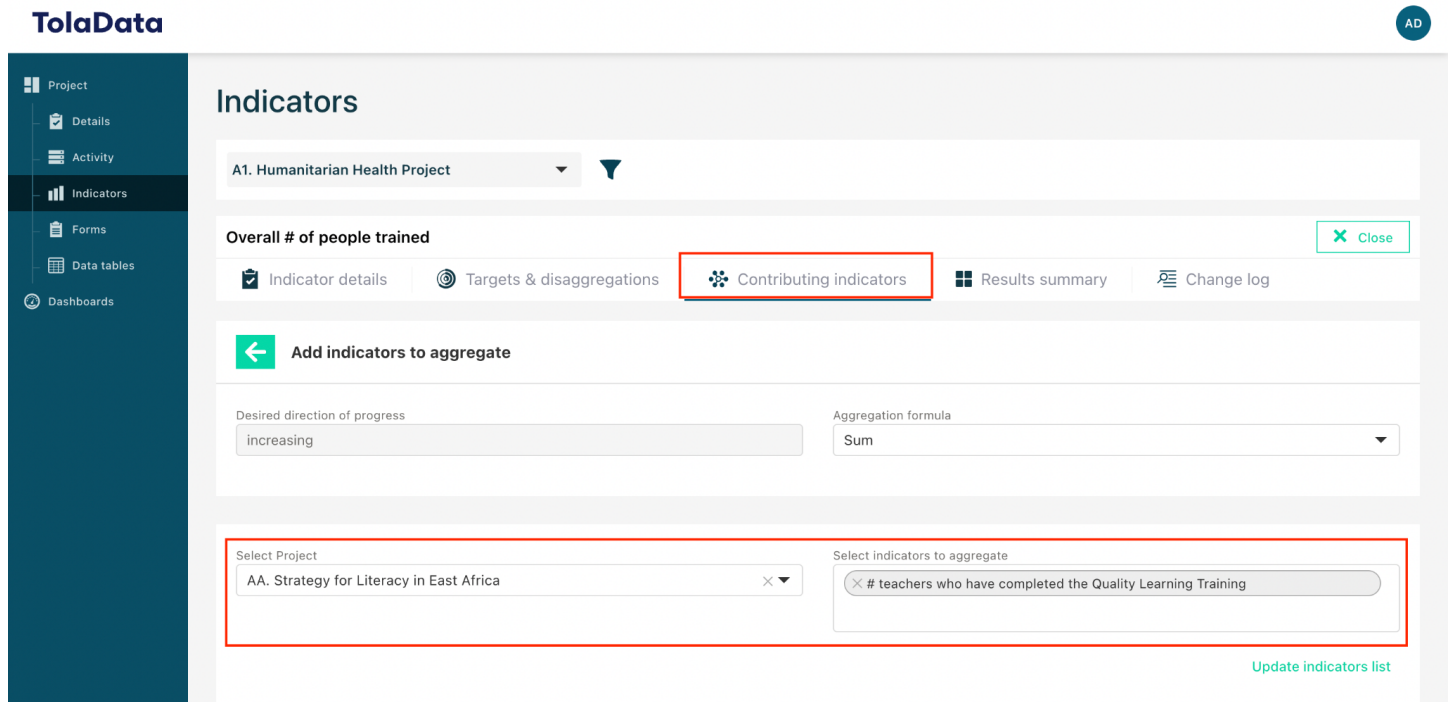

9.2. To learn more about sharing data between projects see the tutorial video: https://www.youtube.com/watch?v=fYEJxaK4zhw&t=1s&ab_channel=TolaData

9.3. To create an aggregated indicator, navigate to the indicator page and select the green '+Add new indicator' icon and check the box labelled 3. below for an aggregated indicator.

9.4. In the contributing indicators section, select the project you would like to take the contributing indicators from and then select the indicators themselves. You can add as many contributing indicators with the same indicator format and calculation formula as you like.

9.5. You can weight and adjust aggregated indicators as well as specifying the calculation formula to apply to the aggregated indicator. For more information on weighting and adjusting, see the knowledge base article:
https://www.toladata.com/docs/knowledge-base/aggregating-indicators-from-different-projects/aggregated-indicators-weighting-and-adjusting/

9.6. Once you have selected all contributing indicators select save. The actual value will automatically aggregate as well as the disaggregation types and reporting periods applied to the contributing indicators.

9.7. In the indicator workflow the aggregated indicator can be identified by the 'aggregate icon', located next to the delete button.
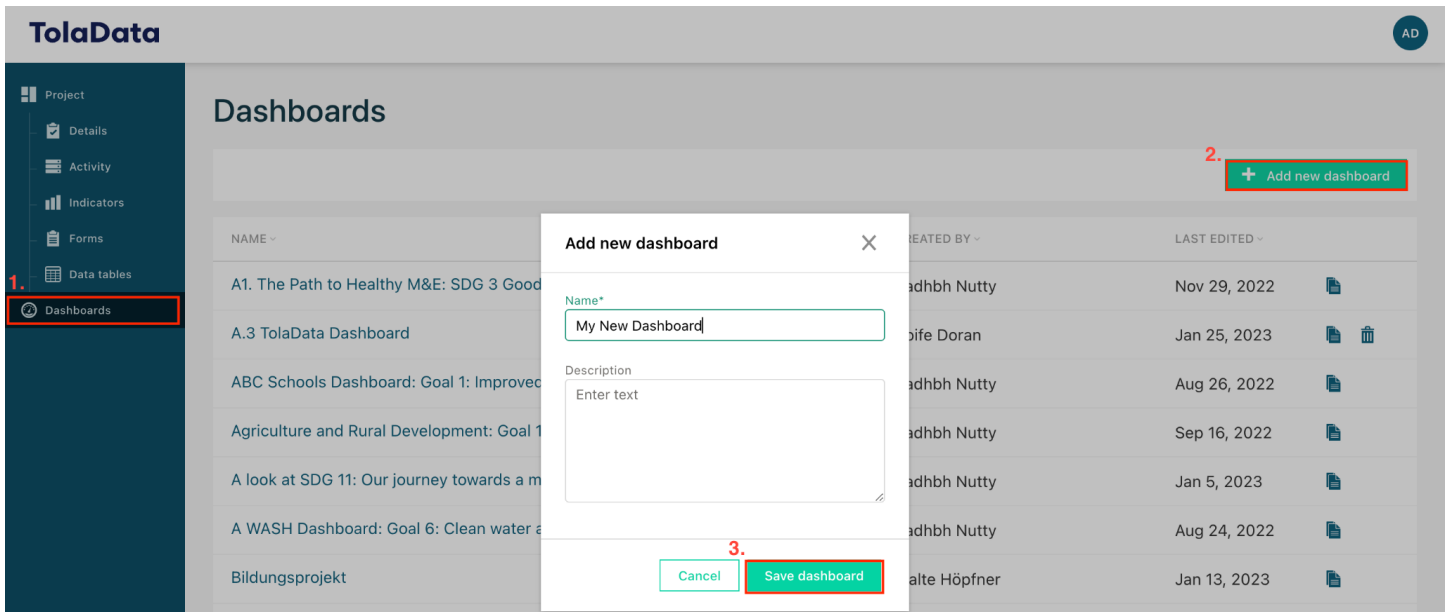

Exercise F.
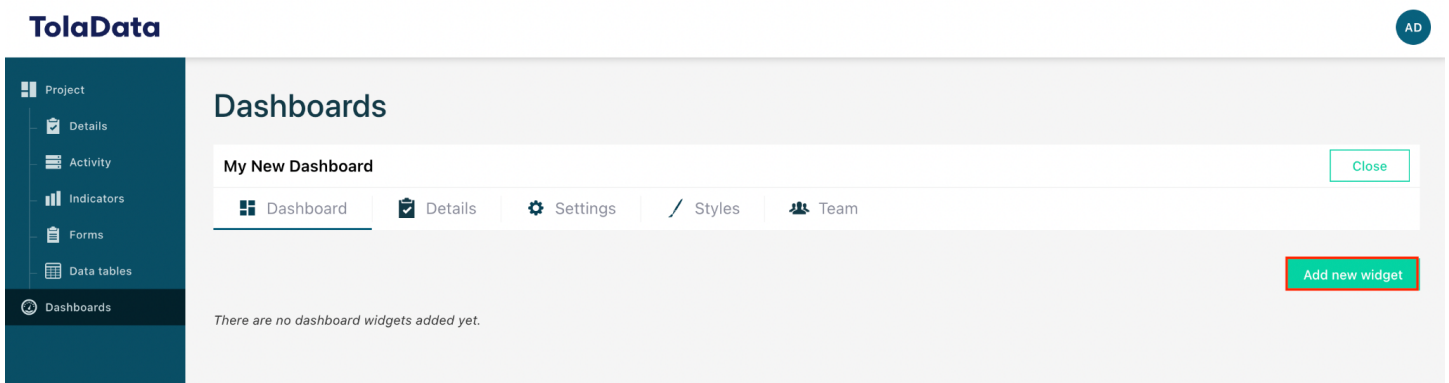
☐ Create an aggregated indicator
☐ Add three contributing indicators - these can be from within a project or from a project you have shared
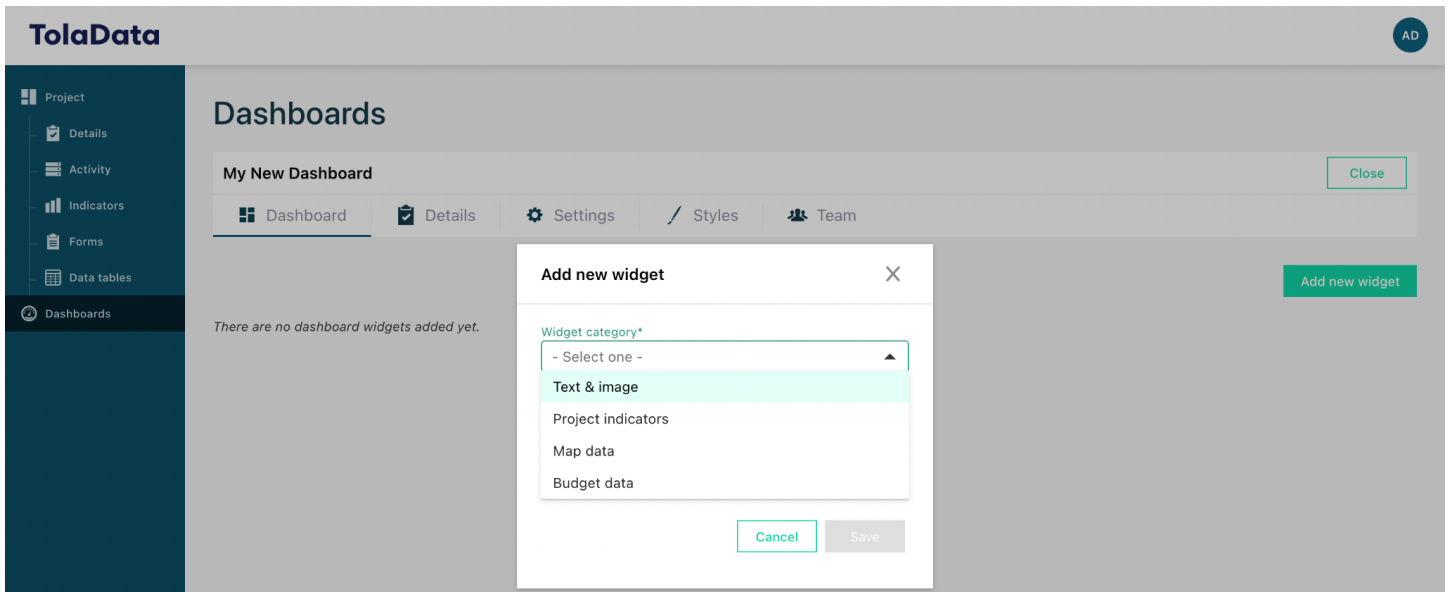
10. Visualise your results by creating dashboards

10.1. Select 'Dashboards' in the navigation panel and then click 'Add new dashboard'.
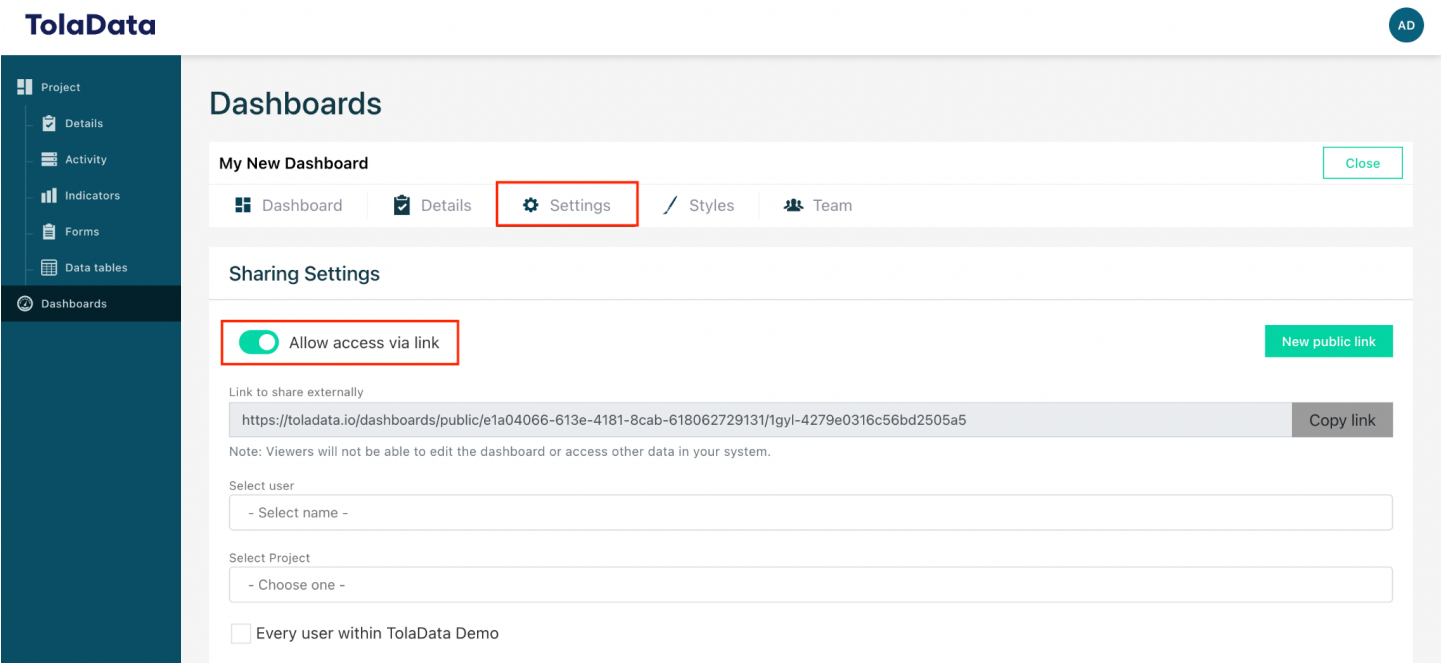

10.2. After entering a name and clicking save you will automatically come to your empty dashboard. You can add data to it by clicking 'Add new widget'.

10.3. You can choose between different types of widgets, including text/image widgets and various types for project indicator, map and budget visualisation.

10.4. Share your dashboard by clicking on the 'Settings' tab. Within this tab you will see a toggle that, when activated, will generate an unguessable URL. To share with external users, click 'Copy link'. You can now paste the link into your email or send it through other means to share your dashboard with users who do not have access to TolaData.
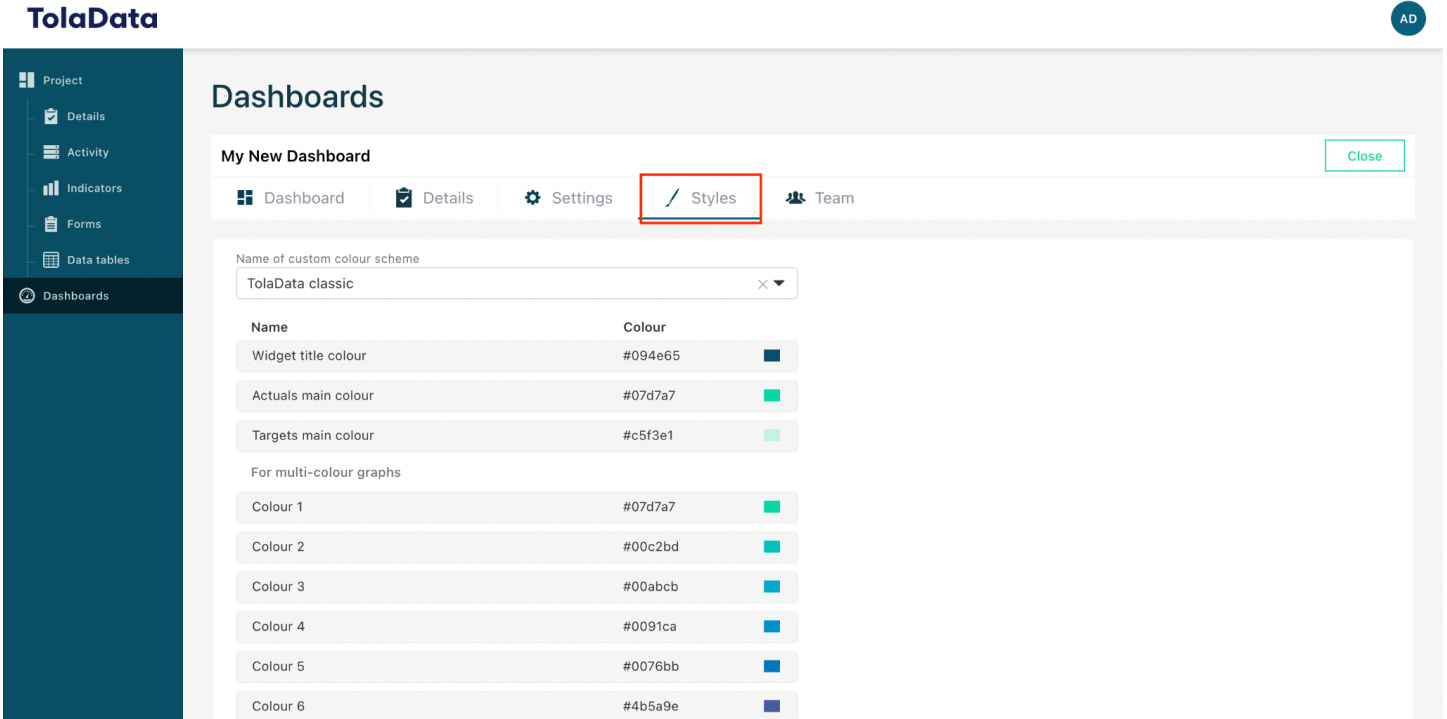
10.5. Additionally, you also have an option to share the dashboard with individual members of your organisation unit or with entire project teams.

10.6. To allow other team members to edit and add information to your dashboard, you can invite them to the dashboard and set their permissions in the 'Team' tab.

10.7. You can change the colour of your dashboard widgets by selecting a different style package in the 'Styles' tab. Note that the style packages are created by the Org Admin in the Admin Console.

10.8. More information on dashboards is available in our knowledge base: https://www.toladata.com/docs/knowledge-base/dashboards/

Exercise G.

☐ Check out this TolaData dashboard: https://toladata.io/dashboards/public/02527e34-29fd-4a5a-a308-d3cde9ffb98d/1aox-2216752dd3be61d86c3b

☐ Read through the widget configuration guide: https://www.toladata.com/docs/knowledge-base/dashboards/configurable-widgets/

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11. Where to get more help

11.1. You can find step by step guides to help with all the features in TolaData by clicking on the 'Guides' button in the bottom left hand corner.

11.2. Speak with one of our User Support representatives using the live webchat available in the bottom right hand corner.

11.3. Find all our user guides, best practice guides and latest product release notes in our knowledge base on our website: https://www.toladata.com/docs/

11.4. Access a range of tutorial videos on our TolaData YouTube channel

11.5. Contact us at info@toladata.com

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